



**EDUCATION AND WORKFORCE DEVELOPMENT CABINET  
OFFICE OF VOCATIONAL REHABILITATION**

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**SERVICE FEE MEMORANDUM**  
CP-TB-10-11-02

TO: Office of Vocational Rehabilitation (OVR) Staff, Branch Managers Counselors, and Assistants, CDPVTC Director, Case Management Director, and Counselors  
Office for the Blind (OFB) Staff  
Client Assistance Program (CAP)

FROM: Mindy Yates, Systems and Fiscal Management Branch  
Benefits Analysis Team (Dave Matheis, Teresa Brandenburg, Donna Osburn, Kellie Scott, Pat Selch, Chris Sheeting, and Gloria Gibson)

Patricia Selch MRC, CRC  
Systems and Fiscal Management Branch  
Office of Vocational Rehabilitation

DATE: November 23, 2010  
**UPDATE: June 1, 2012**  
**UPDATE: October 15, 2012**  
**UPDATE: August 6, 2013**  
**UPDATE: February 10, 2014**  
**UPDATE: August 20, 2015 P Selch**  
**UPDATE: January 1, 2016 P Selch**

RE: Benefits Analysis

The purpose of this update is to note changes in the WIPA programs in the state and to clarify continuing education requirements for entities providing Benefits Analysis services to OVR.

Two Work Incentives Planning and Assistance (WIPA) programs at the Center for Accessible Living (CAL) and Goodwill Industries of Kentucky (Lexington) were funded by the Social Security Administration as of August 1, 2015. The grants were funded for a three year period. CAL serves roughly the western half of the state and Goodwill serves the eastern half. **(Please note: Independence Place of Lexington is no longer a WIPA program).** There is no charge for this Benefits Analysis service. However, a release should be sent with the referral so that a report may be obtained. If a consumer is referred early in the vocational rehabilitation process and they are only thinking about work, they may not receive a BS&A and may not even be seen in person by the WIPA. Authorizations for services should not be made to any WIPA as of August 1, 2013 for a Benefits Analysis. Referrals can also continue to be sent to CWIC's not associated with a

WIPA Program. The authorization for this service should follow the attached fee structure. A Benefits Analysis (BA) referral can be made at any point in the rehabilitation process but is best suited to SSI-D, SSI-B and/or SSDI recipients who are in the early stages of the development of an Individual Plan for Employment.

When sending a referral for a Benefits Analysis (whether it is with a WIPA or another CWIC), the consumer must provide their BPQY to the CWIC. The OVR counselor can assist the consumer to call the Social Security office at 1/800-772-1213 to make this request. The consumer can also obtain a BPQY by going to their local SSA office. Such referrals would be appropriate when it is the consumer's choice to use a specific individual CWIC not employed by a WIPA, or when a report is not available from a WIPA, as previously described.

To be qualified to provide the Benefits Analysis service, the vendor must be certified as a **CWIC**. OVR will pay Provisionally Certified CWICs the same rate as CWICS for the first twelve months after the attainment of this provisional certification. If the individual has not attained full certification within twelve months s/he will no longer be considered for payment for the Benefits Analysis. In addition, any vendor providing the Benefits Planning and Analysis must obtain 18 contact hours per calendar year. This will be monitored by OVR. Training through the Work Incentive Training Projects at Virginia Commonwealth University or Cornell University (online) are recommended, however other training can be approved in advance by the OVR monitoring staff.

A Benefits Analysis is highly recommended when the consumer:

- ☐ Receives SSDI with prior work experience SSA is not aware of
- ☐ Is a dual recipient (SSI-D & SSDI)
- ☐ Receives other state or federal benefits that may be affected by employment
- ☐ Receives Medicaid waiver services
- ☐ Wants to be self-employed

Within sixty (60) days of receiving the referral for a BA, the **CWIC** must meet with the consumer and:

1. Gather pertinent information and obtain a Benefits Planning Query (BPQY) and verification of other Federal and State benefits (e.g., Medicaid, Medicare, Food Stamps, attendant care or Medicaid waiver services).
2. Prepare a benefits analysis that, at a minimum, must include:
  - ☐ The consumer's name, contact and demographic information
  - ☐ The consumer's goals for employment and earnings
  - ☐ An overview of the Social Security work incentives that apply to the consumer
  - ☐ The impact of employment on Social Security benefits, health care, and other State and Federal benefits received by the consumer
  - ☐ Strategic Plan for Work Incentives Management and Support
3. Depending on the complexity of the situation, the Counselor may request the CWIC meet or confer by telephone with the Counselor and the Consumer prior to the payment of the fee.

**Work Incentive Follow-up Support** can be for:

- a. Assistance with developing, implementing & tracking a PASS plan.
- b. Assistance with reporting wages or training on how to report.
- c. Assistance with claiming work incentives, such as Impairment-Related Work Expenses, Subsidies, 1619b, etc.
- d. Assistance with any other issues related to Social Security that may affect the individual's pursuit of employment and/or ability to earn wages.

Fee Structure for Benefits Analysis by CWIC		FEE
<b>Benefits Analysis</b> Payable upon receipt of invoice and written BENEFITS ANALYSIS Report		<b>\$450.00</b> <i>Exp. Code 10V</i> <i>BUN 6794</i>
<b>Work Incentive Follow-up Support Services (for active cases)</b> Payable upon receipt of invoice and written meeting summary		<b>\$50.00 per hr 10 max</b> <i>Exp. Code 90W</i> <i>BUN 6794</i>

- OFB will use their agency budgets.

Contact information for qualified vendors and the WIPA programs can be found on our website at: <http://ovr.ky.gov/programs/services/ssticket.htm>.